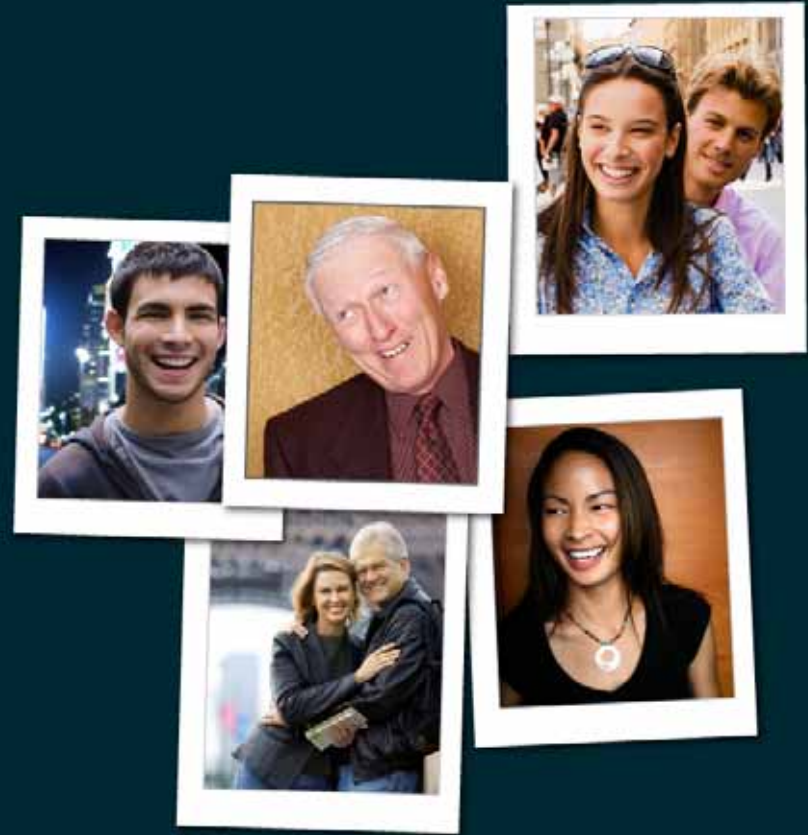


SUMMIT 08



## THE ROLE OF VOICE SELF-SERVICE IN CONTACT CENTER EFFICIENCY

Bob Zach, Director Product Line, Voice

**RIGHT  
NOW.**

CONTACT CENTER  
AT THE BREAKING POINT?



STRUGGLING TO REDUCE COSTS WITHOUT DESTROYING CUSTOMER EXPERIENCE?



...About Customer Experiences  
that make People and  
Contact Centers  
happy!



- The Solution
- The Benefits
- The Portfolio
- Business Case Drivers
- Professional Services
- Questions & Answers

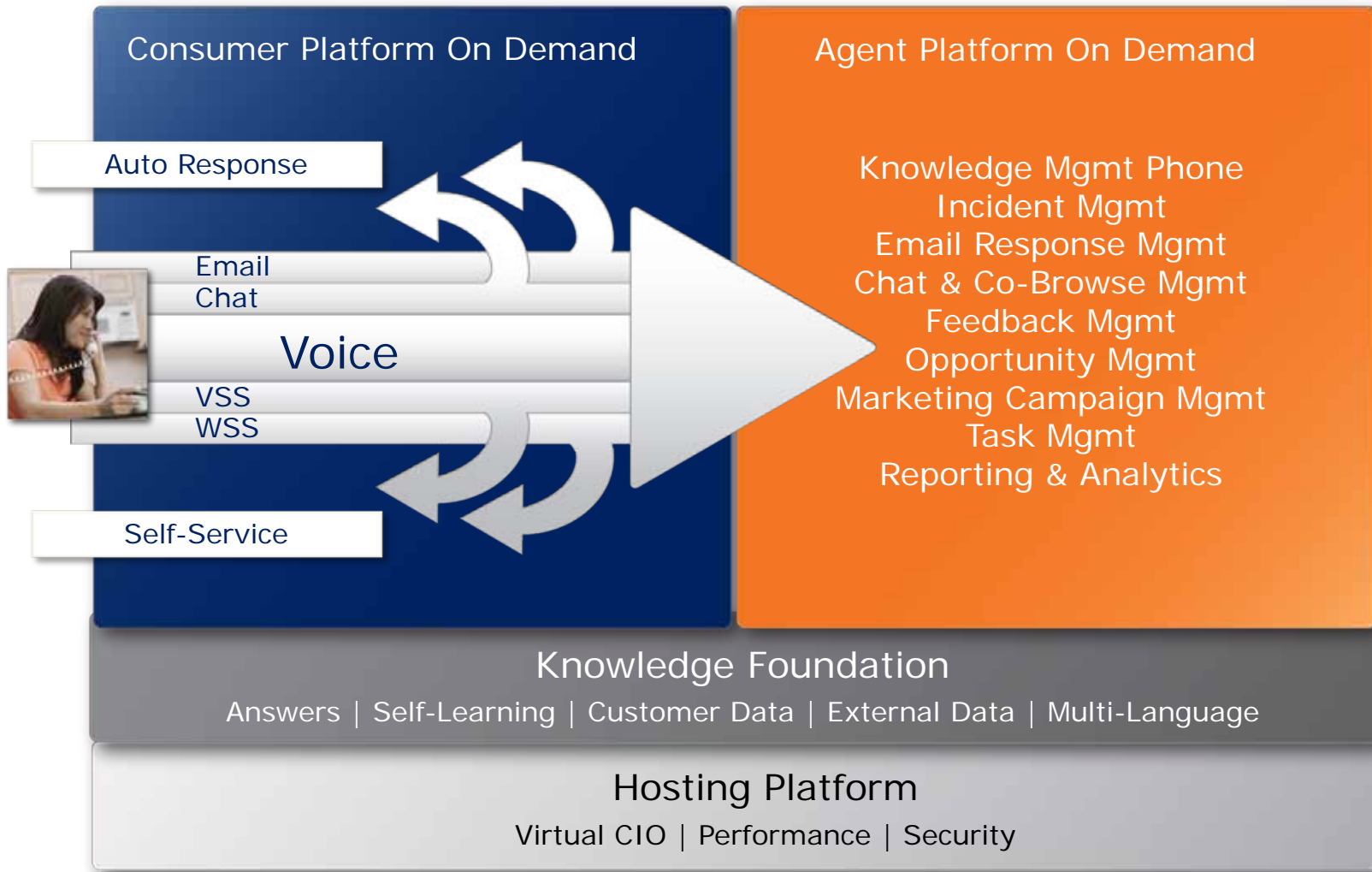
# AN INTEGRAL APPLICATION PLATFORM COMPONENT...

**RIGHT  
NOW.**



# ...THAT DRIVES CONTACT CENTER EFFICIENCY...

**RIGHT  
NOW.**



...AND MAKES CUSTOMERS HAPPY!

RIGHT  
NOW.



- Fast
- Accurate
- Seamless



- Call Routing & Management
- Voice Self-Service Applications
- Voice Survey Applications
- Rapid Implementation Services
- Managed Services Follow-Through



- **Intelligent, empowering caller experiences**
  - Caller record identification & update
  - Relevant, personalized options
  - Immediate access to services and knowledge
  - Seamless transition to agent assistance
- **Contact Center efficiencies**
  - Call deflection
  - Handle-time reduction
- **True “Voice-of-the-Customer” Feedback**
  - Satisfaction surveys
  - Opinion gathering



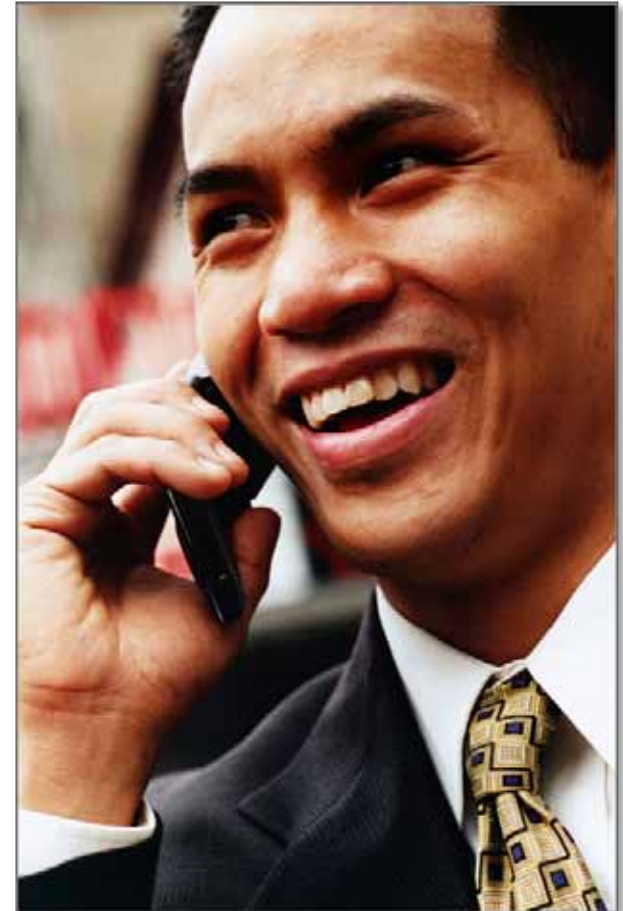
- **Call Routing & Management**
  - One Number Routing
  - Contact Information Management
  - Incident Information Management
  - Screen Pop to RNT Agent desktop
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  - Knowledge Base Access
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## *Automatically identify callers and manage Contact Records*

- **Automatically identify, capture and display contact information**
  - Create new contact records automatically
  - Match callers to existing contact record
  - Reduces call handle time
  - Auto Screen Pop on agent desktop
- **Automated Name & Address lookup**
  - Reverse white page lookup
  - Use ANI or manually captured digits to search national directory and automatically create full contact record
- **Automatically create and attach call session information (incident)**



# VOICE CONTACT MANAGEMENT

- **Personalized experience leveraging CRM knowledge**

- Dynamically generated caller experience based on CRM data
- Auto Language selection
- Prior interaction assistance
- Immediate Access to:
  - Automated Services
  - Agent Queues
  - Individual Agents

- **Capture Caller Information**

- Language preference
- Caller type
  - (Consumer, Dealer, etc.)
- Create Custom Fields

- **Auto Create Contact Records**

- Screen Pop to agent for immediate care

Contacts << Contacts David Lanning

Contact... ^

Contact... ^

Recent I... ^

David La 080918-4 080918-4

Home Analytics Contacts Answers Incidents Commo... Service... Sales C... Marketi...

Last Name\* Lanning Organization

Email dlanning@rightnow.com Salesperson [N

Office Phone 5858992235 Agent ID

Address 940 High St Victor NY Login dla

Language English

PersonType Dealer

Carrier Sprint Title

Opportunities (0) Notes Tasks (0) Incidents (36)

| Statu | Response I | Resolution | Source   | Referer | Subject       |
|-------|------------|------------|----------|---------|---------------|
| Unres | 0h 0m      | 0h 0m      | Public X | 080918- | Bluetooth Set |
| Unres | 0h 0m      | 0h 0m      | Ask A Q  | 080811- | VSSSurvey     |
| Unres | 0h 0m      | 0h 0m      | Public X | 080801- | VSS           |
| Unres | 0h 0m      | 0h 0m      | Public X | 080801- | VSS           |
| Unres | 0h 0m      | 0h 0m      | Public X | 080801- | VSS           |
| Unres | 0h 0m      | 0h 0m      | Ask A Q  | 080731- | test          |
| Unres | 0h 0m      | 0h 0m      | Public X | 080729- | VSS           |
| Unres | 0h 0m      | 0h 0m      | Public X | 080729- | VSS           |

- Create incidents using natural language without agent assistance
- Capture specific information or freeform (voicemail) feedback
  - Populate custom fields
  - Record caller message for reference and compliance,
    - 'Voice message' permanently attached
- Automatically route to skilled agents
  - All incident knowledge on the agent's desktop
  - Optional rule-based incident routing
- Incident Management rules and escalation ensure follow-up & SLA compliance

The screenshot displays a software interface for incident management. At the top, there is a form with several fields: Reference # (080619-000008), Contact\* (David Lanning), Status\* (Solved), Organization Name, Assigned, Product (Motorola Ra:), Disposition ([No Value]), Category (Bluetooth\_S), Language (English), and Last FAQ ID (11). Below the form is a tabbed interface with tabs for (0) Tasks (0), Organization, Session (0), and Attachments. The Attachments tab is active, showing a table with columns for Name, Siz, Created, Update, Desc, Pri, and Action. The table contains one row with the value 'Valued\_3' and dates '06/19/20'. The interface also includes a toolbar with icons for Add Files, Open, Download, Properties, and Options. At the bottom, a status bar shows 'Logged in as: Dave Lanning | Editing 7 objects (2 modified)'. Arrows from the text on the left point to the 'Assigned' field and the 'Attachments' tab.

| Name     | Siz | Created  | Update   | Desc | Pri | Action   |
|----------|-----|----------|----------|------|-----|--|
| Valued_3 | 19. | 06/19/20 | 06/19/20 |      |     | <a href="#">Open</a> , <a href="#">Download</a> , <a href="#">Delete</a> |

## Screen Pop reports with IVR interaction data

- IVR 'session data' permanently stored as an incident
- Automatically associated with customers Contact record
- IVR Session information displayed to agent
- Immediately available to screen pop to agent for a seamless customer experience

The screenshot displays the RightNow CRM interface for an incident with Reference # 080801-000005. The interface includes a ribbon with 'Home', 'Editor', 'Actions', 'Proofing', 'Related Activities', and 'Links and Info'. The main area displays fields for Reference #, Status (Unresolved), Assigned, Disposition ([No Value]), Language (English), Contact (David Lanning), Organization Name, Product (Motorola Razor), Category (Voicemail\_General), and Last FAQ ID (65). A 'Messages' pane at the bottom shows a customer message from David Lanning on 08/01/2008. The status bar at the bottom indicates 'Logged in as: Dave Lanning | Editing 2 objects'.

# ADVANCED DESKTOP INTEGRATION

Voice Self-Service determines call reason  
Screen pops Guided Assistant to the Agent Desktop

The screenshot displays a customer service agent's desktop interface. At the top, a call record is visible with the following details:

- Reference #: 080918-000005
- Contact\*: David Lanning
- Status\*: Unresolved
- Assigned: RNT Full Access, Dave Lanning
- Disposition: [No Value]
- Language: English
- Organization Name: [Redacted]
- Product: Motorola Razor
- Category: Bluetooth\_Setup (circled in red)
- Last FAQ ID: 11

Below the call record, a navigation bar includes tabs for 'es', 'Contacts', 'Details', 'Time Billed (0)', 'Tasks (0)', 'Organization', 'Session (0)', 'Attachments', 'Audit Log', and 'Guided Assistance'.

The 'Guided Assistance' screen is active, showing a decision tree for the issue 'Have your activated your Bluetooth headset?'. The tree includes the following steps:

- Have your activated your Bluetooth headset?
  - Yes
    - Have you attempted to pair your Bluetooth headset to your phone?
      - Yes
        - Is your Bluetooth headset paired to your mobile phone?
          - Yes: At this point your Bluetooth headset is conected to your mobile device
          - No: Answer #187: How do I select my headset?
        - No: Answer #186: How do I pair my Bluetooth Headset?
      - No: Answer #185: How Do I Sync my Bluetooth Headset?
    - No
  - No

On the right side of the guided assistance screen, there is a summary question: 'Have your activated your Bluetooth headset?' with 'Yes' and 'No' buttons.

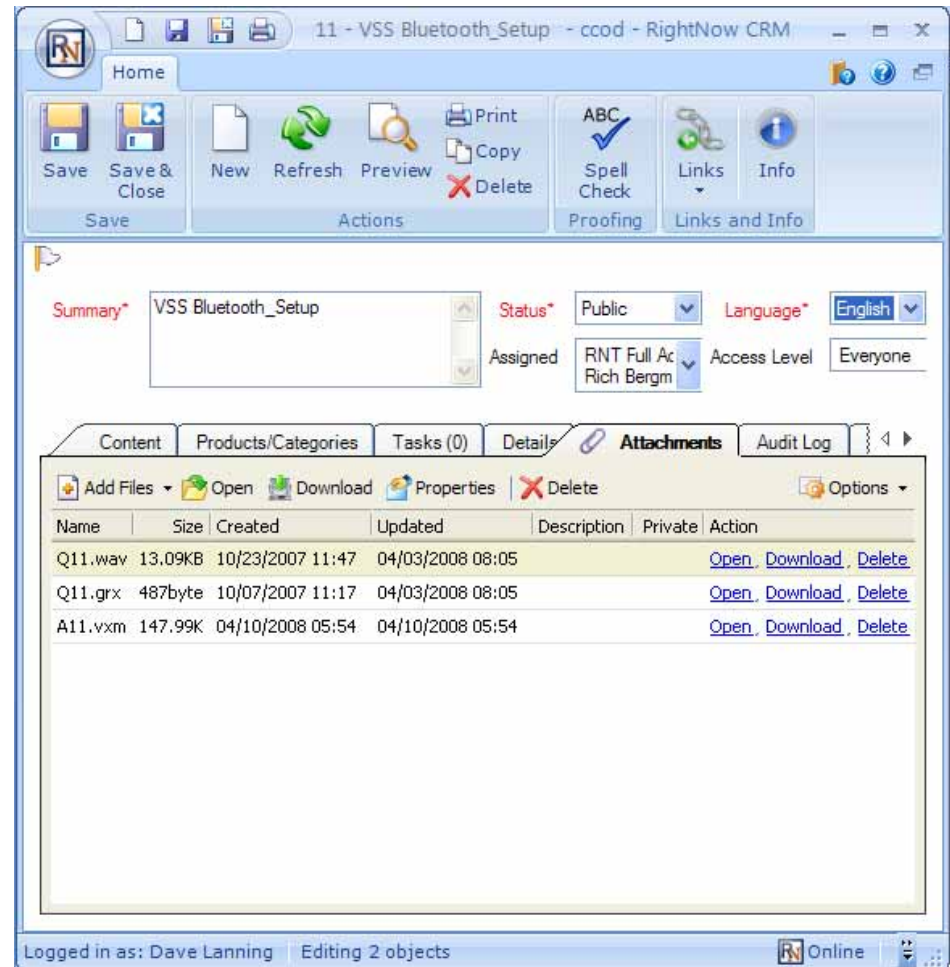
At the bottom of the interface, it shows 'Logged in as: Dave Lanning' and 'Online 100%'.



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  - Outbound Survey Management

## *Extend the reach of web self-service to your voice channel*

- Voice access to KB
  - Ask questions via speech recognition & receive answers instantly
- Fully integrated with RightNow's knowledge base
  - IVR Content Management using Standard RNT KB Content tools
- Dynamic menus based on historical usage
- Knowledge driven agent queues
  - Optional Agent specialization as defined by content
- Embedded scripts for custom answers and custom call treatment



*Maximize your investment in 'online' content and services*

- Provides customer ability to check status of various items by phone
  - Order status
  - Shipping status
  - Rebate status
  - Repair status
  - Return status
  - Account status
- Integrates with front-office, back-office, and other external systems
  - Provides customer one-stop shop for status information
- Custom presentation dialogs
  - Status
  - Tracking Numbers
  - More...
- Adapts to your back-end database
  - JDBC
  - XML
  - Web Services
  - Custom APIs

The screenshot displays the Motorola Moto Store website interface. At the top, the Motorola logo and 'MOTOROLA intelligence everywhere' are visible, along with the 'MOTO STORE' branding and a 'My Shopping Cart' link. Below the header, there is a 'Hello moto' greeting. The main content area is divided into several sections: 'Product Support' with links for Manuals, Search FAQs, Data Connectivity, Bluetooth Support, Mobile Phone Tools, Register Your Product, Disability Access Solutions, and Contact Us; 'Order Support' with links for Check Order Status, Return Policy, Shipping Rates & Policy, Find a Store, and Rebates; and 'Repairs' with links for Learn about Repair, Check Repair Status, and View Warranty Information. A 'Repair Status' section is highlighted, showing a progress list: 'Phone Received' (checked), 'Diagnosis Complete' (checked), 'Process Complete' (checked), 'Quality Testing Complete' (checked), and 'Phone Shipped' (checked). A 'Notes' section states: 'Our records indicate that your phone is being repaired by one of our Authorized Repair Shop locations. Please check back with the shop to receive the status of the repair.' A 'Tracking Number: 1ZE9F4760259268876' is provided. At the bottom, a message reads: 'Any more problems? We know they come up every now and then, so let us know. Call us at 1-800-331-6456 if you have questions or want to talk about your repair.'

## *Easily find your stores anytime, anywhere via telephone*

- Make it easy for customers and prospects to find the store or office closest to them via the telephone
  - Serve customers who prefer phone channel
- Search by
  - City and State
  - Zip/Postal Codes
- Extends location information already on your website
  - Ensures consistent answers regardless of channel used
- Web administration
  - Single database of locations to maintain for both phone and web inquiries
  - Actionable analytics
  - Configurable service properties

The screenshot shows the Motorola MOTO STORE website's location finder interface. At the top, there is a navigation bar with the Motorola logo and the tagline "intelligence everywhere". The main header features the "MOTO STORE" logo and several menu items: "Accessories", "Phones", "Two-Way Radios", "Downloads", and "Home and Office". Below the header is a search bar with the text "Search the site" and an "ok" button. The main content area contains a search form with the following fields and options:

- Enter your search criteria (Your Address)**
  - City:
  - State:
  - Postal Code:
- Select your search criteria**
  - Distance:
  - I am Looking for:

A "Search" button is located below the form. At the bottom of the page, there is a footer with the text "Powered by RIGHT NOW" and "Customer Service: 1-866-BUY-MOTO (1-866-289-6686) 888-390-6456 (TDD/TTY)". Below this, there are links for "Security", "Shipping", "Return Policy", "Contact Us", "Privacy", "Terms of Sale", and "Terms of Use". The footer also includes the copyright notice "Copyright ©1999-2003. Motorola, Inc. All rights reserved."



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- **Conduct automated voice surveys over the phone/voice channel**
  - Immediately after agent-assisted service for immediate feedback
  - Invite customers to provide feedback by calling a centralized "800" number
- **Voice and speech recognition provide natural means of conducting survey**
  - Simple method to gather immediate feedback
  - Capture responses as ratings or as free form feedback
    - (wav files attached to the survey record)
- **Support for multiple rating types**
  - Yes / No
  - Rating List
- **Integrated with RNT Analytics**
- **Incident Management rules enable immediate escalation**

The screenshot displays a software interface for managing customer surveys. At the top, there are several input fields: 'Subject\*' with the value '/VSSSurvey', 'Reference #' with '080811-000004', 'Contact\*' with 'David Lar', 'Status\*' with a dropdown set to 'Unresolved', 'Organization Name' (empty), 'Assigned' with a dropdown set to '[No Value]', 'Product' with a dropdown set to 'Motorola R2', 'Disposition' with a dropdown set to '[No Value]', and 'Category' with a dropdown set to '[No Value]'. Below these fields is a navigation bar with tabs for 'Messages', 'Contacts', 'Details', and 'Time Billed (0)'. Under the 'Messages' tab, there are options for 'Send On Save', 'SmartAssistant', and 'Search Knowledgebase'. A 'View' dropdown is set to 'All' and a 'Sort' dropdown is set to 'Date - Descending'. The main content area shows a list of messages for a customer: 'Customer By Web Form David Lanning, 08/11/2008 09:14 AM', 'Call Id: 000B008A-100100BF-0001', and a survey application 'CVISurveyApp for GlobalSolutionsSurvey'. A list of survey events follows, including 'CallBegin', 'SurveyID = 99991', 'Courteous = VerySatisfied', 'Urgency = VerySatisfied', 'Resolve = VerySatisfied', and 'Valued = VerySatisfied', all dated '11 Aug 2008'.

- **Proactively capture feedback**
  - Outbound dialer proactively, efficiently and cost-effectively captures feedback
  - Target customer segment
- **Target key, relevant audiences**
  - Identify and survey targeted audience segments for focused insight
  - Achieve a broader sample base than web-based surveys only
  - Concentrate on particular products, services, or issues of concern
- **Achieve high response rates**
  - Offer a friendly and engaging means of connecting with customer
  - Provide a quick, intuitive, easy-to-use means of answering questions
- **Act on customer voice with insightful feedback analytics**
  - Act immediately

The screenshot displays a CRM interface for managing survey data. At the top, the 'Subject' field is set to 'VSSSurvey'. Below it, the 'Reference #' is '080811-000004' and the 'Contact' is 'David Lar'. The 'Status' is 'Unresolved'. Other fields include 'Assigned' (set to '[No Value]'), 'Disposition' (set to '[No Value]'), 'Organization Name', 'Product' (set to 'Motorola R'), and 'Category' (set to '[No Value]').

Below the form, there are tabs for 'Messages', 'Contacts', 'Details', and 'Time Billed (0)'. The 'Messages' tab is active, showing a list of messages. The first message is from 'Customer By Web Form' by 'David Lanning' on '08/11/2008 09:14 AM'. The message content includes a 'Call Id: 000B008A-100100BF-0001' and a list of survey results for 'CVISurveyApp for GlobalSolutionsSurvey'.

| Date        | Time        | CallStatus | SurveyID | Courteous     | Urgency       | Resolve       | Valued        |
|-------------|-------------|------------|----------|---------------|---------------|---------------|---------------|
| 11 Aug 2008 | 12:11:58 PM | CallBegin  |          |               |               |               |               |
| 11 Aug 2008 | 12:12:37 PM |            | 99991    |               |               |               |               |
| 11 Aug 2008 | 12:13:02 PM |            |          | VerySatisfied |               |               |               |
| 11 Aug 2008 | 12:13:17 PM |            |          |               | VerySatisfied |               |               |
| 11 Aug 2008 | 12:13:39 PM |            |          |               |               | VerySatisfied |               |
| 11 Aug 2008 | 12:13:51 PM |            |          |               |               |               | VerySatisfied |



- Call Deflection Rates
- Average Handle Time
- Customer Loyalty
- Customer Satisfaction



- Contact Center Assessments
- Implementation Services
- Managed Services

- **Initial deployment services**
  - Content development and implementation
  - Grammar development
  - Advanced scripting for complex interactions
- **Results-based engagement**
- **Leverage RNT industry expertise**
- **Packaged Applications**



- **Ongoing services**
  - Performance reports and analyses
  - Service tuning, enhancements and maintenance
  - Automated alerts and recommendations
  - Consultations
  - Planned maintenance with performance metric monitoring
  - 24 X 7 X 365 support
- **No IT assistance required**
  - RightNow performs day-to-day system management
  - Customer focuses on content and core business
  - No Voice expertise required from customers



# RIGHTNOW VOICE CUSTOMERS

RIGHT  
NOW.



**MOTOROLA**



**Dun & Bradstreet**



